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PRODUCTION AND CONSUMPTION OF WOOD  
1941, 1942

LUMBER

I Production goal for 1942

1. Production desired: Required lumber production for 1942 is estimated at 33.6 billion board feet.
2. This is up 33 percent over the five-year average production 1936-40 (25.2 billion board feet).
3. Reported 1941 production is something over 31 billion board feet, but in addition it is estimated that there was about 1-1/2 billion board feet of unreported production, principally by small mills. Thus total production in 1941 is estimated at 32.5 billion board feet (97 percent of the estimated 1942 production).
4. In September, production for 1942 was estimated at 32 billion board feet, 1.6 billion board feet short of the current estimate. (The former estimate did not allow enough for the unreported production.)

II Relation of 1942 goal to needs

Estimated lumber requirements in 1942 total 33 billion board feet which it will be noted is 0.6 billion board feet less than estimated production. While this denotes a favorable situation during the first year of war, it may actually prove to be extremely difficult. One reason is that military and defense plant construction will require large quantities of lumber running heavy to certain sizes and grades. Inability to move the unpopular grades, especially uppers, except for the very highest quality used for ship decking, planking, pontoons, aircraft, etc., would be an effective drag on production. Furthermore, in order to produce 33 billion feet of the sizes and grades required, it is estimated that total production should exceed this figure by as much as 2 billion board feet instead of 0.6 billion board feet as indicated for 1942. Such a production is unlikely for the reasons that follow, and this points to the need for prudent lumber distribution and perhaps the absorption of upper grades in defense orders.

III Difficulties to overcome in attaining 1942 goal

- a. Unbalanced demand for certain sizes and grades of material (explained above).
- b. Tendency toward disorderly placement of orders for large quantities of material. Undoubtedly much of the confusion, high prices and difficulty attendant upon the first cantonment building program, stemmed

(over)

from the surprise placement of large orders for quick delivery. Orderly advance buying must be the mode, and advantage taken of every opportunity to apprise operators of prospective demands for their products. This applies not only to lumber manufacturers, but to the box, cooperage, plywood, and other suppliers as well. Responsibility for anticipating defense orders should not be left to industry.

c. Labor shortage may be a serious obstacle to attainment of the goals. Already there is a struggle for operators to maintain production owing to competition for men with the armed forces and other defense industries which offer greater inducements. This is true the country over, but is especially true in the south, where, it is reported, labor "recruiters" are operating to the detriment of forest industry.

d. Equipment. Logging and lumbering operations require heavy machinery including tractors and trucks which are in great demand by the army. The meeting of production schedules is contingent upon replacements and parts. Supply failures have not as yet been an important factor, but as the machinery gets older and the situation tightens they may develop.

The tire situation is a new threat of large proportions, because in recent years the proportion of logs and lumber transported by trucks has increased enormously. Probably no less than 75 percent of our saw-log production is moved by truck, and a still higher proportion of pulpwood and other forest products.

f. Transportation. If lumber doesn't move, its production cannot be continued. Granted that lumber for direct military uses will move. These quantities are only part of the lumber cut, and the pile-up of the remainder would soon bring things to a halt. Movement of men and supplies in 1942 will tax railroads to the limit. Rubber-tired vehicles will not be available to assume the additional burden, and scarcity of ship bottoms has already proved a handicap to west coast operators in particular. This situation gives further emphasis to the need for far-sighted construction planning, advance buying, stock piles, and orderly purchasing. It also focuses attention upon the desirability of local purchases which can and are being made easier through liberalization of specifications.

### Special Problems

The above general discussion of lumber does not take into account certain critical items the volume of which is relatively small, but the importance of which is acute. Spruce lumber for aircraft, both United States and British, is a case in point. Only 1 to 5 percent of the volume of the best spruce logs meets aircraft specifications. Spruce forests are limited in extent and over extensive areas were high-graded during the last war. Other such items requiring special attention are requirements and supplies of veneer and plywood, walnut for gun stocks, alternate wood for aircraft spruce and birch veneer, piling for water front development and industrial items such as handles, spindles, etc.



PULPWOOD

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I Production goal for 1942

1. Production desired: 15.8 million cords. While this quantity from American forests together with an expected additional 1-1/2 million cords from Canada will not provide for a totally unrestricted use of pulp in 1942, it represents an amount which will tax our pulping capacity to the limit.

2. Relation to 1936-40 average: 15.8 million cords represents an increase of 70% over the five-year average production. In 1936, domestic production was about 7.5 million cords; in 1940, 12.7 million cords; in 1941, about 14.3 million cords. This increase in pulpwood production was occasioned (a) by a phenomenal growth of the use of pulp and paper products in this country coupled with (b) the cessation of very substantial European imports of pulp and paper as a result of the war.

3. Relation to 1941 production: 15.8 million cords represents an increase of about 1-1/2 million cords over the estimated 1941 domestic production. Throughout 1941 many pulp mills were operating at forced draft, producing in excess of normal capacity.

4. Change from September goal: No change

II Relation of 1942 goal to needs

The 1942 production of pulpwood will in its entirety be consumed domestically. There are no significant reserves and stocks on hand represent normal inventories, (3 to 4 weeks supply in the south; † six months supply in the north where cutting operations are seasonal). Canadian imports have never exceeded 1-1/2 million cords and although there may be demand, any increase is very uncertain; hence, if the anticipated forced draft operation of U. S. pulp mills is achieved, the whole of the 15.8 million cords of domestic pulpwood will be needed.

III How can the 1942 goals be reached?

1. The goal of 15.8 million cords of domestic wood is more pulpwood than has ever been produced. It is more than twice as much as was produced in 1936. It will not be met without difficulty. A recent questionnaire survey showed operators could foresee a possible 14.3 million cord production not including a possible 1.9 million cords from Canada.

2. Difficulties to overcome

a. Pulpwood producers are very much concerned over the rubber tire situation. Probably no less than 80% of the pulpwood moved in this country is moved on trucks at least for a part of the journey to the Pulp plants. Under the rationing plan as now constituted it is believed

that pulpwood production may be seriously curtailed. Large quantities of pulp must be moved between now and April while roads are frozen else it cannot be moved, and there is anxiety lest tire relief come too late.

b. Labor: Pulpwood producers are now struggling to maintain output. Defense industry and the armed forces have drawn heavily upon woods workers. Some 4,500 Canadians have entered eastern districts, as a consequence of the freezing of wages in Canada, and while this and perhaps similar moves yet to come eases the situation here, it intensifies it there, and we are counting on 1-1/2 million cords of Canadian wood.

c. Transportation: Truck replacements and parts have not been responsible to date for significant reductions in output. They may later if things get tighter and if the tire situation is unrelieved. Although there will be demand for at least 1 1-1/2 million cords from Canada, at least 700,000 cords of Canadian wood must move by water if it moves at all. Availability of bottoms is not assured.

d. Pulpwood production is going to be pretty well measured by pulp production, and attention is directed to the fact that since June 1941 pulp production is reported at 100 to 110 percent of capacity. This means forced draft operation without time for prudent overhaul and maintenance. This may, especially if parts and replacements are not available, be a factor in reduced output.

e. In the north a substantial portion of the pulp wood is peeled in the woods. This makes cutting a spring seasonal operation. Scarcity of labor and the need for more wood than can be produced in the spring may necessitate lengthening the cutting season. This will mean rough wood which has to be barked by machinery at plants. Lake States mills are better prepared for this contingency than those in the northeast, but in both places new machinery installations will be required which necessitates advance planning, priorities, etc. Rough wood utilization, if prepared for, will also enhance the possibilities of getting our Canadian quota.



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February 16, 1942

*11/18/54* *RS*

# REGIONAL DISTRIBUTION OF FOREST PRODUCTS PRODUCTION - 1936 TO 1940, 1941, AND 1942

National production of wood products of various kinds has been tentatively estimated at 14.5 billion cubic feet for 1942. This total is comprised of:

		Billion Cu. ft.
Lumber	33.6 billion board feet	6.7
Pulpwood	14.3 million cords	1.4
Fuelwood	75.0 million cords	4.1
Other	2.3 billion cubic feet	2.3
		<u>14.5</u>

This production by regions and type of product is shown in the following table:

	Lumber			:	Pulpwood			:	Fuelwood			:	Other	
	2/ Billion bd.ft.	2/ 1936-40	2/ 1941	:	2/ Million cords	2/ 1936-40	2/ 1941	:	2/ Million cords	2/ 1936	2/ 1941	:	1/ Billion cu.ft.	1/ 1936
Northeast	1.1	0.9	1.1	:	3.0	1.9	3.0	:	10.5	8.4	10.5	:	0.2	.15
Lake States	1.2	0.9	1.1	:	1.2	1.0	1.2	:	10.0	8.1	10.0	:	0.1	.08
Central States	0.4	0.3	0.4	:	-	-	-	:	8.9	7.8	8.9	:	0.2	.15
Subtotal	2.7	2.1	2.6	:	4.2	2.9	4.2	:	29.4	24.3	29.4	:	0.5	.38
South	15.6	10.9	15.1	:	6.8	4.2	6.9	:	41.2	37.0	41.2	:	1.4	1.0
Columbia River Basin	12.5	9.7	12.2	:	3.3	2.2	3.3	:	2.3	2.3	2.3	:	0.4	.29
California	2.3	1.7	2.2	:	-	-	-	:	1.5	1.5	1.5	:	-	-
Southern Rocky Mountain	0.5	0.4	0.45	:	-	-	-	:	0.6	0.6	0.6	:	-	-
Subtotal	15.3	11.8	14.85	:	3.3	2.2	3.3	:	4.4	4.4	4.4	:	0.4	.29
Total	33.6	24.8	32.5	:	14.3	9.3	14.3	:	75.0	65.7	75.0	:	2.3	1.17

Northeast: New England and Middle Atlantic States.  
 Lake States: Michigan, Minnesota, and Wisconsin.  
 Central: Illinois, Indiana, Iowa, Missouri, Ohio.  
 South: States south of the Ohio and Potomac, also Arkansas, Louisiana, eastern Oklahoma and eastern Texas.  
 Col. River: Idaho, Montana, Oregon, and Washington.  
 So. Rocky Mt.: Arizona, Colorado, New Mexico, Utah, Wyoming, and Nevada.

- 1/ 1936 figures are fairly representative of the average for 1936-40.  
 2/ Preliminary estimate. Allocation to regions of Estimated 1942 cut based on 1940 regional production data.  
 3/ This quantity of domestic pulpwood is 1 1/2 million cords short of estimated needs.





